CHILTON'S
AUTOMOTIVE INDUSTRIES
SINCE 1895

NOVEMBER 1987

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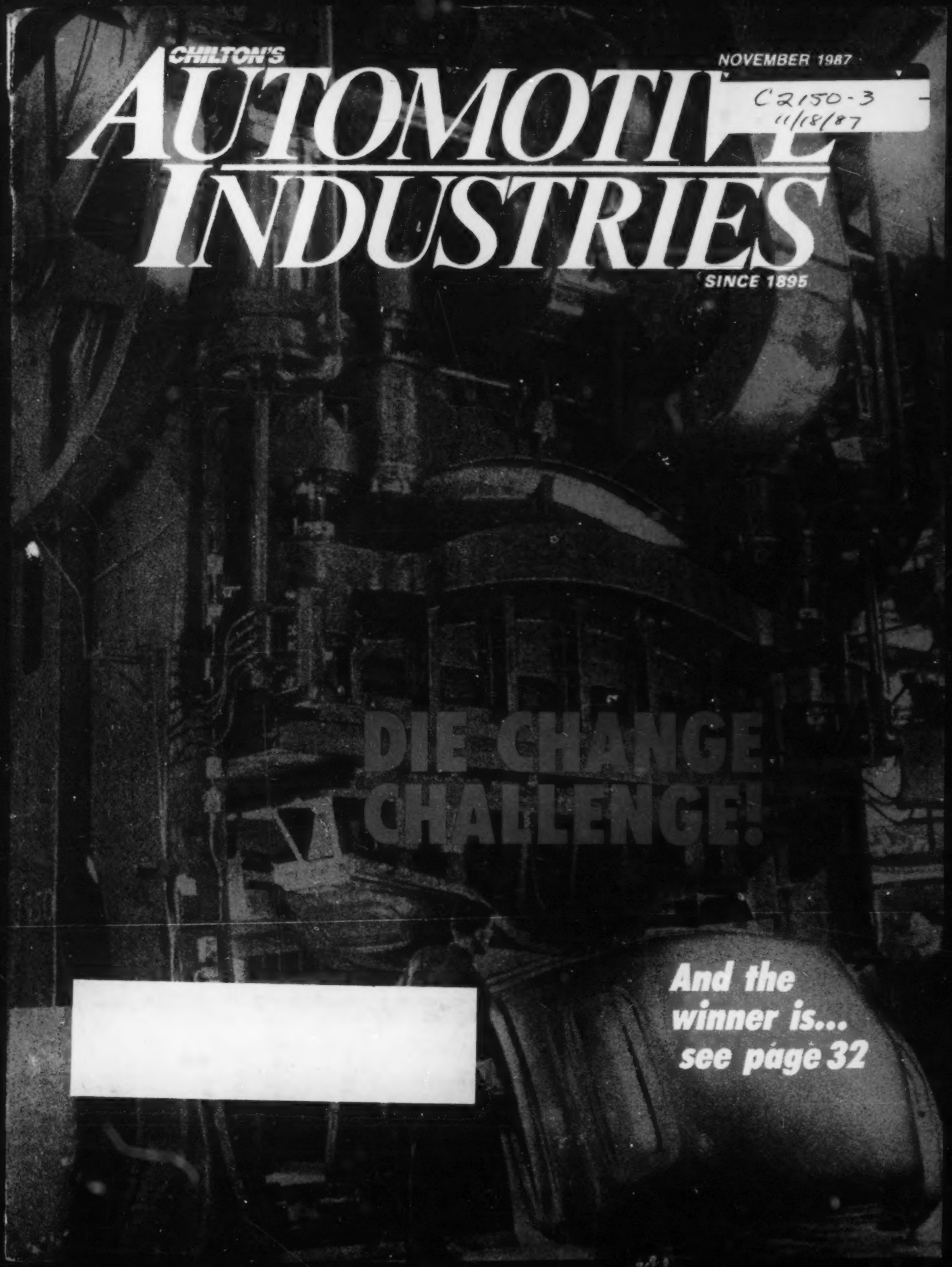

DIE CHANGE CHALLENGE!

And the winner is... see page 32

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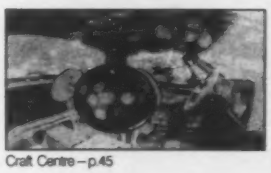

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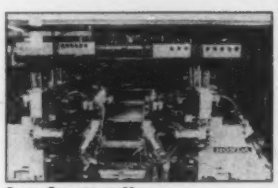

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AUTOMAKER QUARTERLY REPORT

Imports grab four of the top ten sales spots for the 3rd quarter.

by Dr. Thomas O'Grady

Foreign makers are quickly becoming residents of the sales top ten. For the third quarter, imports occupy fourth, fifth, ninth and tenth place in sales. Compared to last quarter, the Hyundai Excel moved up from sixth to fifth, while GM's Cavalier fell to seventh.

The Toyota Camry is a new arrival at number ten. Nissan's Sentra moved up to ninth.

The good news for GM is that the Corsica/Beretta moved from ninth in quarterly sales all the way to number three. It was inevitable that some of those sales would come from the Cavalier and the Celebrity – the latter of which dropped from third in sales to eighth.

Ford again held on to the Number One and two spots with Escort and Taurus.

Toyota's Camry is a new entry into the top ten. This bodes well for the opening of Toyota's Kentucky plant with three Camry models. If Toyota continues with some imports as well as its domestic production, I expect the Camry to do even better. Otherwise, the company's days' supply of Camry will run low.

Dr. Thomas O'Grady heads Integrated Automotive Resources, Inc. in Wayne, Pennsylvania.

The Hyundai Excel is an interesting car. Although it is but one carline, many variations give it considerable breadth.

Market shares are continuing to shift. The domestics had slight declines. The import companies, which were experiencing problems early in the year, appear to have worked harder recently.

In particular, Subaru and Volkswagen moved up 8.5% and 4.8%, or .13 and .09 percentage points, respectively, in market share.

1987 continues to be on target, at about a 10.1 million unit year. Next year, we will not experience the loss we suffered this year from the 1986 Tax Reform Act. That, and the effect of the presidential election year, should result in about a 10.6 million unit 1988. AI

WHAT'S HOT! Domestic Auto Sales (3rd Quarter Results)

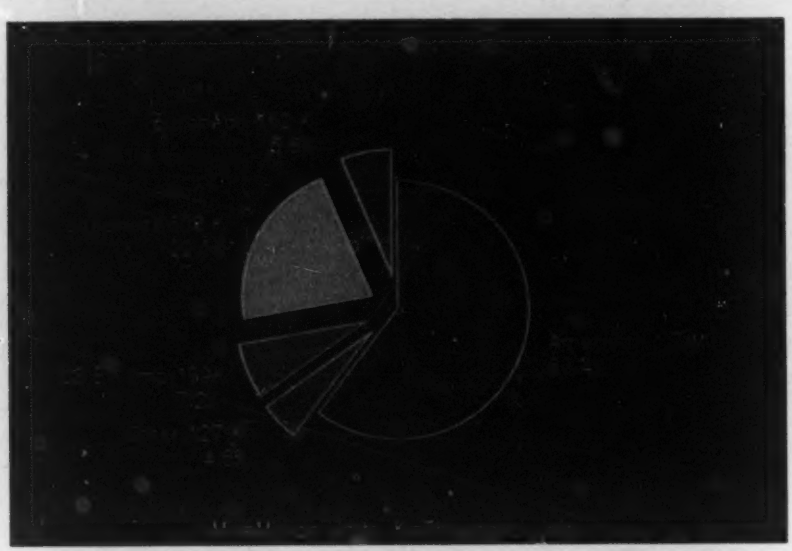
Carline	'87	'86	% Change
Escort	114,048	113,906	0.12%
Taurus	99,581	58,557	70.1%
Corsica/ Beretta	89,272	--	--
Accord*	87,084	81,428	6.9%
Excel	78,421	60,571	29.5%
Clera	70,049	92,816	(24.5%)
Cavalier	68,769	90,187	(23.7%)
Celebrity	62,677	100,327	(37.5%)
Sentra*	61,004	62,326	(2.1%)
Camry	53,252	40,421	31.71%

*–Includes imports
( )–Negative value

US Passenger Car Market Shares To Date

Manufacturer	Sales	% Total
General Motors	2,939,698	37.26%
Ford	1,593,613	20.20%
Chrysler	828,387	10.50%
Honda/Acura	525,662	6.66%
Nissan	450,839	5.71%
Toyota	434,633	5.51%
Subaru	130,572	1.66%
VW	148,829	1.89%

(Continued p.58)



Passenger Car Market Share By Geographic Base

Third Quarter 1987

Manufacturers	Total Sales	Total Market Share
American	1,669,952	60.4%
Japanese	607,879	22.0%
European	162,007	5.8%
US Built Imports (VWUS, Honda, NUMMI, Nissan, Toyota)	199,056	7.2%
Other Imports	127,673	4.6%
Total	2,762,567	100.00%

3RD QTR. DOMESTIC LIGHT TRUCK PRODUCTION

COMPANY	FULL-SIZE TRUCKS	COMPACT TRUCKS	FULL-SIZE VANS	COMPACT VANS	FULL-SIZE SPORTS UTILITY	COMPACT SPORTS UTILITY	TOTAL 1986	TOTAL 1987
FORD	104,077	70,803	50,623	39,663	12,051	32,102	1,433,317	1,139,134
CHEVROLET	125,832	61,208	38,671	39,222	7687	47,618	1,245,190	967,516
CHRYSLER	24,581	18,366	15,568	87,097	4444	—	576,136	529,116
GMC	44,308	15,217	11,440	10,422	5429	11,037	390,176	298,257
JEEP	—	9959	—	—	3875	37,586	NA	159,432
NISSAN	—	23,975	—	—	—	—	108,048	67,431

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ALFA 164!

Here Comes Fiat... Again

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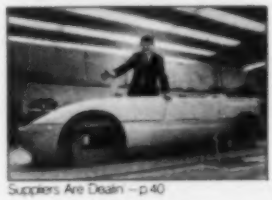

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SUPPLIER 100

An alphabetical listing of the industry's top OEMs.

	1986 Sales*	1986 Profit*	% Return On Sales	% Return On Equity
AC Spark Plug (GM)	1	1	1	1
Accustar/Chrysler	22,514	1,404	6.2	22.5
Alcoa	4,667	254	5.4	(9.22)
Allied Signal	11,794	605	5.1	(1.3)
Allis-Chalmers	771	(8.6)	NA	(36.3)
AMP	1,933	164	8.5	2.2
Atlantic Richfield	14,585	615	4.2	1.
Armco	3,086	(472)	4.2	11.4
Armstrong Rubber	866	(37.6)	NA	(9.9)
Armstrong World Ind.	192	122	6.4	36.8
Ashland Oil	6,991	208.6	3.0	54.8
Atlas Copco	NA	NA	NA	NA
Ball Corp.	1,070	58.9	5.5	16.6
BASF/Inmont	3,645	104.6	2.9	NA
Bethlehem Steel	4,333	(152.7)	NA	(60)
Borg Warner	3,623	206.3	5.7	67.2
Robert Bosch	NA	NA	NA	NA
Briggs & Stratton	745	34.1	4.6	22.1
Budd Co.	NA	NA	NA	NA
Caterpillar	7,321	76.0	1.0	(3.4)
Celanese	2,891	213.0	7.4	63.5
Central Foundry (GM)	1	1	1	1
Champion Spark Plug	883.8	17.2	2.0	15.2
Cincinnati Milicron	850	23.3	2.7	15.8
Clark Equipment	954	(60.6)	NA	(22.8)
Colt Ind.	1,616	89.3	5.5	(83.7)
Cross & Trecker	NA	NA	NA	NA
Crown Cork & Seal	1,619	79.4	4.9	15.1
Cummins Engine	2,304	(107)	NA	(3.6)
Dana Corp.	3,695	85.9	2.3	33.2
Deere & Co.	3,516	(229.3)	NA	(18.2)
Delco Elect. (GM)	1	1	1	1
Delco Moraine (GM)	1	1	1	1
Delco Products (GM)	1	1	1	1
Delco Remy (GM)	1	1	1	1
Detroit Diesel (GM)	1	1	1	1
Dow Chemical	11,113	732	6.6	48.0
Dow Corning	1,085	110.6	10.2	NA
Dresser Ind.	3,661	9.6	0.3	10.4
DuPont	27,148	1,538	5.7	28.4
Eagle Picher Ind.	648.3	38.8	6.0	23.9
Eaton	3,812	137.6	3.6	17.6
Emhart	2,094	(10.2)	NA	3.3
Federal Mogul	941.6	3.6	0.4	8.2
Firestone	3,712	85.0	2.3	20.5
Fisher Guide (GM)	1	1	1	1
FMC Corp.	3,003	152.5	5.1	(60.5)
Ford	62,716	3,285	5.2	51.4
Ford Divers. Prod.	1	1	1	1
GenCorp	3,099	130.0	4.2	11.4
General Electric	35,211	2,492	7.1	21.9
General Motors	102,814	2,945	2.9	.2
BF Goodrich	2,553	32.7	1.3	34.5
Goodyear	10,328	124.1	1.2	40.3
Gould	1,437	(101.8)	NA	(46.2)
ICI	1,500	824	5.5	NA
Inland Steel	3,173	19.3	0.6	3.3
IPC	NA	NA	NA	NA
ITT	7,895	493.7	6.3	43.55
Kaiser Aluminum	2,233	(32.7)	NA	(18.38)
Kelsey Hayes	NA	NA	NA	NA
Lear-Siegler	NA	NA	NA	NA
LTV	7,271	(3,251)	NA	43.07
Mack Truck	1,711	(30.56)	NA	2.35
Magna International	NA	NA	NA	NA
Mobay	NA	NA	NA	NA
Monsanto	6,879	433.0	6.3	66.42
Motor Wheel	NA	NA	NA	NA
National Steel	NA	NA	NA	NA
Navistar Intl	3,356	1.73	0.1	(44.12)
New Departure/Hyatt	NA	NA	NA	NA
Norton Corp.	1,107	(33.1)	NA	0.82
Owens-Corning Fibrgls	3,644	15.6	0.4	(62.66)
PACCAR	1,795	54.2	3.0	5.76
PPG Industries	4,687	316.4	6.8	46.9
Rexnord	1,093	(103.7)	NA	33.4
Reynolds Metals	3,638	191.8	5.3	7.62
Sealed Power	665.8	28.5	4.3	(2.17)
Sheller Globe Corp.	940.0	NA	NA	NA
Sherwin Williams	2,253	105.9	4.7	26.53
A.O. Smith Corp.	964.6	28.9	3.0	(8.26)
Signal Companies	NA	NA	NA	NA
Stanadyne	492.7	21.1	4.3	21.73
Stanley Works	1,549	78.7	5.1	22.82
Sterling Eng. Prod.	NA	NA	NA	NA
Textron	5,226	239	4.6	32.7
TRINOVA	1,447	122	8.5	46.3
TRW	6,450	217.7	3.4	(0.9)
Teledyne	3,241	238.3	7.4	(2.77)
3M	NA	NA	NA	NA
Timken	1,058	2.73	0.3	(1.8)
USX	14,000	(1,833)	NA	(14.62)
Union Carbide	7,828	496.0	6.3	25.85
Uniroyal	NA	NA	NA	NA
United Technologies	15,669	72.7	0.5	8.21
Walbro Corp.	NA	NA	NA	NA
Weirton Steel	1,173	45.08	3.8	NA
White-Consolidated	NA	NA	NA	NA
Wickes Companies	NA	NA	NA	NA
Witco Corp.	1,355	65.2	4.8	48.34

* – In millions of dollars. Figures taken from Fortune 500 and company annual reports. [1]GM and Ford do not list divisional figures separately. NA – No public listing or not available.

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